

Luma Budget Quick Reference Guide (QRG)

Agency Header (2400) & Division Descriptions (2500)

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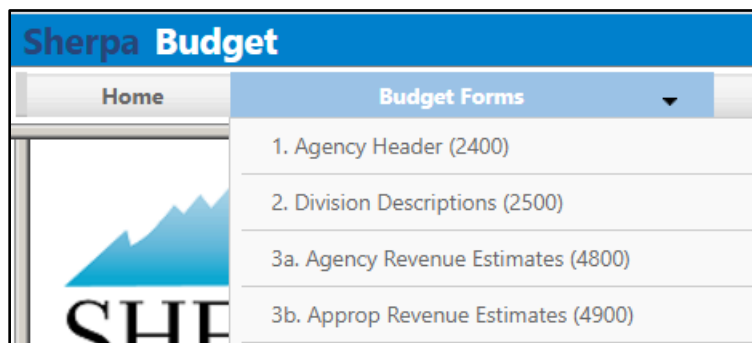
Initiator: Any budget employee

Reason: To fill out the necessary forms in the budget.

These two forms make up the Agency Introduction as described in the Budget Development Manual (BDM). The Division Description, Form 2500 will flow into the Division Description Report (B-3).

Agency Header – Form 2400

Select the form from the Budget Forms drop-down. Form 2400 will be at the top of the menu and Budget Form #1.



Once selected, the system opens the Summary Overview Screen. This screen will list all entries that have a stage that matches the user's access in the system. (i.e. the form has not been “submitted” or move to other stages (workflows) or it has been returned to the user through the stages (workflows)).

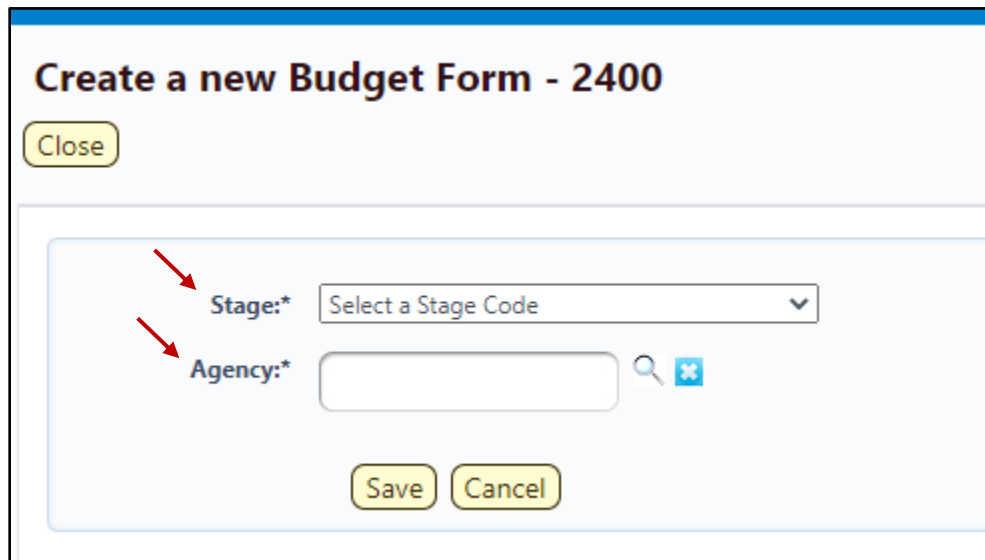
The screenshot shows the 'Agency Header (2400)' Summary Overview Screen. It includes a 'Quick Search' section with a text input field and a 'Show Advanced Filters' button. Below this is a 'Record Actions' section with an 'Add New' button, which is highlighted by a red arrow. The main area contains a table with columns: Form ID, Agency, Stage, Agency, Form Rows, Last Update, Last User, Submit, and Actions. The table is currently empty, displaying the message 'There are no records available.' At the bottom, there is a 'Records per page' dropdown set to 50 and a pagination bar showing 'Records: 0 - Page: 1'.

Select “Add New” for the first entry.

Add New – will initiate the screen below:

1. If completing the initial entry, select the appropriate stage. A budget form does not need to start in Stage 1.
2. Then select the appropriate agency. The only agency(ies) that should appear are the agency(ies) for which you have been granted access.
3. Once complete, select Save.

You have now created a “Parent Transaction”.



Create a new Budget Form - 2400

Close

Stage:* Select a Stage Code

Agency:*

Save Cancel

Budget Form Header:

After selecting the Save Record Action Button on the initial screen, the Header will appear.

Instance ID	Form Definition	Definition Name	Name	Agency
3242	2400	Agency Header (2400)	State Treasurer	150

Stage Code:*
2402
Manager 1

Agency:
150
State Treasurer

Header

Attachments

Agency Name:*
State Treasurer

Statutory Authority:*

Save

Data fields shown above are auto-populated on this screen. Most of the fields are system generated such as the top line outlined in red and are not able to be edited.

Statutory Authority*

- The overall statutory authority for the agency will be loaded into a master data table for the agency and will show up on the Executive Detail Budget Report as the overall statute. This will be auto-populated by the system. A manual change will only be necessary if there is a statutory change for the overall agency.

Before saving the form, review all the data on this screen to ensure it is correct. Once saved, a green message will appear at the top of the screen stating:

Agency Header (2400) was successfully updated.

Attachment Tab:

The functionality of the Attachment Tab is identical on all Budget Forms in the Luma Budget System.

The following documents need to be attached in the Agency Header – Form 2400, updated annually by all agencies, and to accompany the agency budget (as needed) with submission:

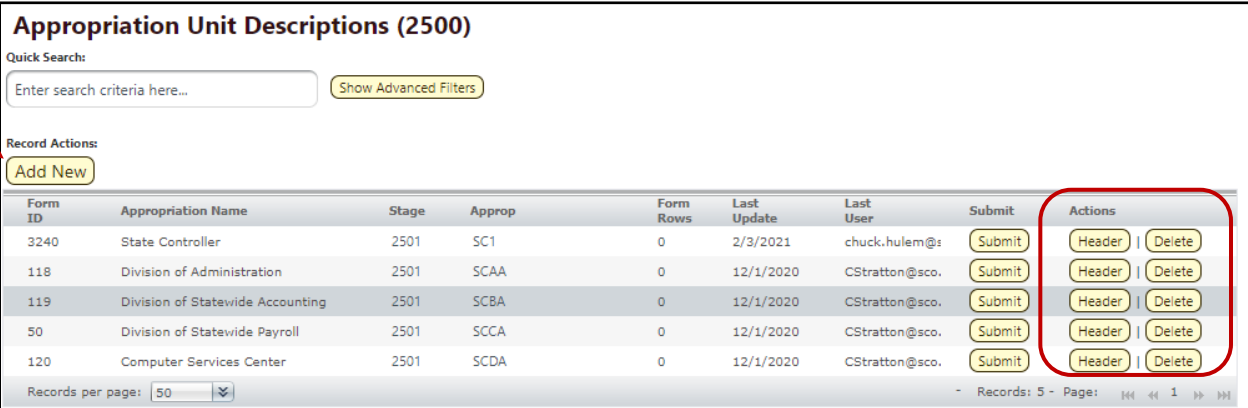
- Organizational Charts (PDF Only)
- 5-year Capital Needs Plan
- Federal Fund Inventory
- Performance Report
- Permanent Building Fund Capital Budget Request

Note: If there is a need to print any of the Luma Budget Parent transactions, the attachment documents will need to be printed separately.

Division Descriptions - Form 2500

An initial Parent Transaction must be created for each division within the agency. When filling out the narrative, it may help to think of this as a description of the budget(s) as they run through JFAC vs. the agency organizational structure. You can use the Legislative Budget Book entry for your agency as a reference and to find the current wording.

There is no Detail tab on this form since there is no financial information required.



Appropriation Unit Descriptions (2500)

Quick Search: [Show Advanced Filters](#)

Record Actions: [Add New](#)

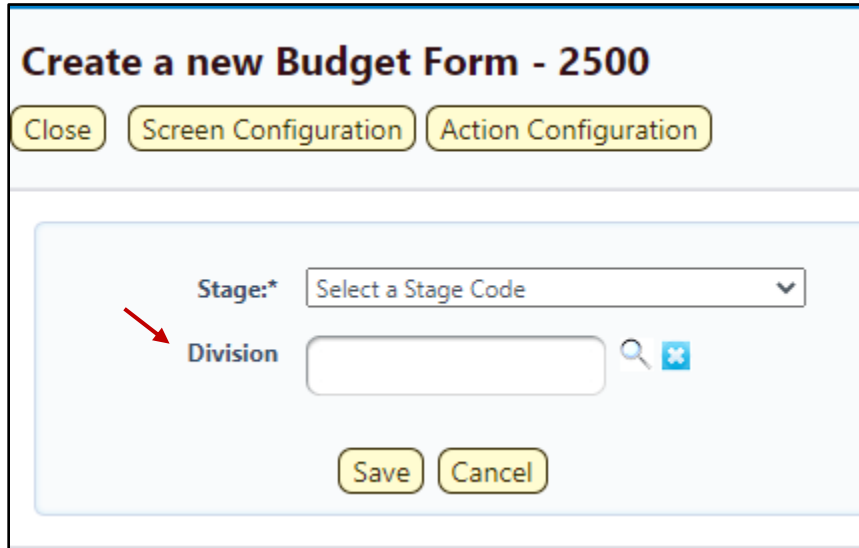
Form ID	Appropriation Name	Stage	Approp	Form Rows	Last Update	Last User	Submit	Actions
3240	State Controller	2501	SC1	0	2/3/2021	chuck.hulem@s	Submit	Header Delete
118	Division of Administration	2501	SCAA	0	12/1/2020	CStratton@sco.	Submit	Header Delete
119	Division of Statewide Accounting	2501	SCBA	0	12/1/2020	CStratton@sco.	Submit	Header Delete
50	Division of Statewide Payroll	2501	SCCA	0	12/1/2020	CStratton@sco.	Submit	Header Delete
120	Computer Services Center	2501	SCDA	0	12/1/2020	CStratton@sco.	Submit	Header Delete

Records per page: [v](#)

Records: 5 - Page: 1 of 1

Add New will bring up the Create a new Budget Form – 2500 dialog box.

Select the appropriate Stage number.



Select the Division code(s) in Luma Budget. This is a budget summary level that summarizes the budget(s) grouping(s) as it will be reviewed by JFAC.

The Division for the State Controller's Office (SCO) is circled below and is part of the hierarchy of the system.

Select the agency division(s) that need to be populated with a description. Each division will need a Parent Transaction. For example, in the multiple division mock-up below, the SCO will need to enter five (5) Parent Transactions and a narrative for each division.

Lookup

Quick Search:

Select	Code	Name
<input type="button" value="Select"/>	PE1	Public Employee Retirement System
<input type="button" value="Select"/>	SC1	State Controller
<input type="button" value="Select"/>	SC2	Division of Statewide Accounting
<input type="button" value="Select"/>	SC3	Statewide Payroll
<input type="button" value="Select"/>	SC4	Computer Center
<input type="button" value="Select"/>	SC5	Business Infor infrastructure
<input type="button" value="Select"/>	ST1	State Treasurer

Records: 1 - 7 of 7 - Pages: 1

Header Tab:

This description will be used to populate the Division Description Report (B3). If a change in the description is made, select the Description Changes box. If there are no changes just submit the budget form without selecting the checkbox.

Budget Form Header

Instance ID	Form Definition	Definition Name	Name	Approp
3648	2500	2. Division Descriptions (2500)	State Controller	SC1

Stage Code:*

Initial Entry

Division

State Controller

Header

Attachments

Full Division Description:*

The State Controller is a member of the executive branch of government and one of seven statewide elected officials in Idaho. The office is organized into four divisions: (1) Administration; (2) Statewide Accounting; (3) Statewide Payroll; and (4) the Computer Service Center.

The Division of Administration (ADM) provides administrative, financial and human resource services for the agency and provides support for the ex officio duties of the State Controller including serving as Secretary to the Board of Examiners, member of the State Board of Land Commissioners, State Social Security Administrator, and Idaho Technology Authority (ITA) member. As Idaho's Administrator of State Social Security Programs, the State Controller is responsible for ensuring state compliance of Section 218 of the federal Social Security Act.

Prior year appropriation bill number(s):*

Current year appropriation bill number(s):*

☒ Description Changes

Following the go-live of the Luma Budget system and the completion of interfaces, the current and prior year appropriation bills will auto-populate for each agency via an interface with the LSO budget database.

Here is how this is achieved:

- Prior year appropriation bill number(s)* - Luma Budget, as part of the reopening of a new budget cycle will take the data that was populated in the Current Year appropriation bill number(s) and move it to this data field.
- Current year appropriation bill number(s)* - This bill number will be populated via a data exchange with the Legislative Services Office (LSO) system. The current year-approved bill number will be automatically uploaded from the LSO system.
- For the first year of implementation, the prior year's bill number, and the current year's appropriation bill number(s) may need to be manually populated.

Result

You successfully completed the Agency Header (2400) and Division Description (2500).

For additional training, please visit the SCO website and Luma Training Portal in the Training tab.

Date: April 9, 2021
Version 1